Treasury Acquisition Institute



Fiscal Year 2014 Course Catalog



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Dear Treasury Acquisition Institute (TAI) Customer:

The TAI is pleased to announce the arrival of our Fiscal Year 2014 Course Catalog. As our valued customer, we continue to listen to your needs and deliver high quality training solutions. This year we have added the following to our course offerings:

Annual Review-Hot Issues in Federal Contracting
Contract Claims
Cost and Price Realism
Critical Thinking and Problem Solving for Contracting Professionals
FAR Less Complicated
How to Read a Government Contract
Information Technology Acquisition
Market Research and Task Level Competition
Requirements Writing Workshop: SOO, PWS, and SOW
Six Disciplines of Performance-Based Project Management™

Our schedule of offerings is designed to meet the needs of the changing federal acquisition environment, to provide training for required certification standards, to address the competencies needed for success, and ultimately, to develop world-class acquisition professionals.

One thing that remains unchanged is our commitment to excellence in our customer service and support.

Thank you for your continued support. We look forward to continuing our partnership in helping you achieve your professional success.

Sincerely,

TAI Staff



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PROGRAM OVERVIEW, POLICES & GENERAL INFORMATION

For additional program and registration information, please visit the TAI website:

TAI Intranet: http://awss.web.irs.gov/Procurement/tai/index.shtml TAI Internet: http://www.irs.gov/uac/Treasury-Acquisition-Institute

Treasury Acquisition Institute's History

The Department of the Treasury and the Internal Revenue Service in partnership with the other Treasury Bureaus on September 14, 1993 established the Treasury Acquisition Institute (TAI). TAI was created to coordinate and lead Departmental and Bureau efforts to obtain the best training possible for their acquisition professionals. Since commencement, many other Federal agencies and organizations have participated in the TAI training program.

Doing Business with the TAI

TAI serves many government agencies and bureaus such as the Environmental Protection Agency, Customs and Border Protection, the Bureau of Engraving and Printing, and the Department of Health and Human services to name a few. If your agency/bureau is interested in attending a TAI course, please contact Rhonda Stewart at (240)613-8353 or via email at Rhonda.L.Stewart@irs.gov for information about establishing an Interagency Agreement with TAI.

Course Location and Hours

The Treasury Acquisition Institute, located at 6009 Oxon Hill Road in Oxon Hill, Maryland, is the training location for all TAI courses. The location is very easy to find and includes free parking.

Classes begin at 8:00 am and end at 4:00 pm unless otherwise noted on the registration confirmation.

IRS Procurement Employees

TAI is your preferred training provider. You should apply for classes held at TAI before considering other training providers. If the dates offered by TAI are not conducive to your work schedule, then you can consider other training providers.

How to Register for TAI Classes

To register for courses, you must create a profile and submit a request through the Federal Acquisition Institute's Training Application System (FAITAS) - https://www.atrrs.army.mil/faitas.

Need Help with FAITAS?

A **FAITAS Employee Quick Start Guide** is located under the Help Menu from the FAITAS login page. Additional guides are located under the Help Menu once logged into FAITAS.

Instructions for creating a profile, submitting a training request for TAI, FAI or DAU sponsored training and printing training certificates in the Federal Acquisitions Institute Training Application System (FAITAS) are located on the TAI website:

TAI Intranet: http://awss.web.irs.gov/Procurement/tai/index.shtml http://www.irs.gov/uac/Treasury-Acquisition-Institute

Frequently Asked Questions for FAITAS are located at https://www.atrrs.army.mil/faitas/External/FAQ.

What's Happens After You Submit Your Request?

Your training request will be submitted via email to the supervisor selected in your profile. (Note: Your supervisor must create a profile in FAITAS for you to select them.)

Your supervisor must go into FAITAS and approve your request before it is submitted to the Treasury Acquisition Institute (TAI) Registrar for approval.

After your supervisor and the TAI Registrar approve your request in FAITAS, you will receive an email confirmation. If you do not receive an email that confirms your registration and/or you need any assistance regarding FAITAS, you **must** contact the FAI Help Desk at (703) 752-9604 or submit a help desk ticket at http://www.fai.gov/drupal/content/help-desk.

IMPORTANT: Your seat in the class is NOT confirmed until you receive an email from training@fai.gov with the subject "Training Request Approved by Federal Acquisition Institute" and the status shows "Reserved" in FAITAS.

TAI Registrar Information

For inquiries about TAI classes, you may send an email to awss.tai.registrar@irs.gov.

Attendance Policy

You are required to attend all scheduled days of your course. If you have to be absent from any portion of the course, you must notify your supervisor, instructor <u>and</u> a Treasury Acquisition Institute (TAI) staff member. Significant absences from the classroom will be reported to TAI and your supervisor and may result in your not receiving credit for the course. Cumulative absences of instructional time may be grounds for failing the class. If you are absent for more than 5% of the scheduled class time, you will be required to retake the entire course.

Wait List Policy

Because of the limited quantity of training, we expect courses to fill quickly. If your desired course is full, we will place you on the wait list and notify you if space becomes available. When you are notified that you have been placed on a course wait list, you could be enrolled in the course when one of the following occurs:

- a colleague in your agency cancels from the course, substitution is requested by their supervisor and the Registrar approves your enrollment; or
- a student cancellation creates a vacancy and you are the next person on the wait list.

To find out if your waitlist position has changed please log into your FAITAS account. You are responsible for making your own travel arrangements; however, you should **not** make travel arrangements until you receive an email confirming your registration reservation.

It is highly recommended that you bring your class confirmation email with you on the first day of your class. Instructors will only admit you if you have a confirmed reservation on their class roster. If you arrive for class and are not on the roster with a confirmed reservation or a wait list number you must leave the class immediately. If you are not on the instructor's roster and believe you have a confirmed reservation, you must see a member of the TAI staff immediately.

Only individuals on the wait list can fill open seats. No walk-ins are permitted to stay for the class. If there are open seats 30 minutes after the class start time, your number on the wait list is used to determine placement. Individuals with confirmed reservations that are going to be late due to traffic or any other unforeseen circumstance must speak to a member of the TAI staff before the start of the class. TAI staff will notify instructors in these cases so your reservation is not forfeited.

No Show Policy and Class Cancellation

A "No Show" will result when you fail to report to class on the first day (at the class start time) and we did not receive and process a cancellation for you in FAITAS prior to the class start date. In the event of a No-Show, you will be prevented from registering for **any** TAI course for a period of 3 months.

All cancellation requests **must** be processed through FAITAS. If you are unable to attend a class for which you are registered, you must cancel your registration in FAITAS no less than **two weeks** before the class start date (**four weeks** for classes with pre-course work). Canceling your registration later than these timeframes, may result in a penalty preventing you from registering for the same course for a period of up to 3 months. Please allow up to 2 days for cancellations to be processed in FAITAS.

Substitution Policy

Your office may substitute a participant by having the supervisor of that participant send an email to awss.registrar.tai@irs.gov no less than 2 weeks before the class start date. The substitute will be enrolled in the class only if there is **no** waiting list. If TAI cancels a course for any reason, we will make every effort to notify all confirmed participants and discuss enrollment in a future session.

Dress Policy

The dress policy at TAI is casual business attire. Shorts, caps, tank tops, athletic sweat suits and flip-flops are inappropriate. For your comfort, we highly recommend you bring a jacket or sweater.

Reasonable Accommodations

It is the responsibility of the employee's manager to arrange for reasonable accommodations (i.e., interpreter for hearing impaired) and to notify the TAI Registrars (Rewa Houston at Rewa.T.Houston@irs.gov and Donald Guy at Donald.I.Guy@irs.gov) no less than three weeks in advance of the class start date to ensure the vendor is notified.

Weather Related Issues

TAI's operating status is the same as the operating status for Federal Employees in the Washington, DC Area. To check operating status in the Washington, DC Area go to the OPM website: http://www.opm.gov/policy-data-oversight/snow-dismissal-procedures. If the Federal Government is closed, TAI will be closed.

When weather-related absences affect significant segments of the course, the instructor will determine if the course will be rescheduled. If a student does not complete the prescribed make-up, no credit will be issued for any part of the course. Many courses offered at TAI are only offered once. If weather conditions prevent you from attending when the Federal government is still operating and the class is still being conducted, you will be responsible for finding alternate training options.

Hotel Accommodations, Transportation and Parking

You are responsible for making your own travel arrangements; however, you must **not** make travel arrangements until you receive an email confirming your registration reservation.

<u>Hotel Accommodations</u>: The Treasury Acquisition Institute is located in close proximity to the National Harbor, Crystal City and Alexandria, VA. Please visit http://www.hotels.com for hotel accommodations in these areas.

Transportation:

Metro Rail Service: The nearest metro rail station is Suitland Metro Station, Green Line.

Metro Bus Service: The metro bus stops in front of the Constellation Centre Building. Information on the metro rail and metro bus systems are available at http://www.wmata.com.

Shuttle Bus Service: There is no shuttle bus service to the building.

Taxi Cab Service: The following taxicab services serve the Washington Metropolitan Area:

- Yellow Cab Company of D.C., Inc. Phone (202) 544-1212
- Maryland Taxi Service
- Phone: (301) 277-6000 or (301) 864-7700

Parking: Free Parking is available in the front of the building.

Smoking Policy

Smokers must use the space provided outside in the rear courtyard, not in the front of the building.

FY 2014 COURSE OFFERINGS

1102 Series Mandatory Contracting (FAC-C)

CON 120: Mission Focused Contracting

CON 215: Intermediate Contracting for Mission Support CON 217: Cost Analysis & Negotiation Techniques CON 218: Advanced Contracting for Mission Support

CON 360: Contracting for Decision Makers

Contracting Officer's Representatives (FAC-COR)

Contracting for CORs (FAC-COR Level II Training)

Acquisition Continuous Learning

Annual FAR Update

Annual Review-Hot Issues in Federal Contracting - New!

Best Value Source Selection

Business Analysis and Decision Making in Contracting

Changes and Equitable Adjustments in Government Contracts - with Professor Nash!

Contract Administration

Contract Claims - New!

Contract Closeout

Contract Disputes and Terminations- New!

Contracting with Small Business Concerns

Cost and Price Realism - New!

Critical Thinking and Problem Solving for Contracting Professionals - New!

Evaluating a Contractor's Performance

FAR Less Complicated - New!

Federal Appropriations Law

Federal Budget Process

How to Read a Government Contract - New!

Information Technology Acquisition - New!

Management of IT Service Contracts

Managing Performance-Based Service Awards

Market Research and Task Level Competition - New!

Project Management for Contracting Professionals

Prompt Payment Act and Voucher Examination

Requirements Writing Workshop: SOO, PWS, and SOW - New!

Six Disciplines of Performance-Based Project Management[™] – New!

FY 2014 Monthly Schedule

Start Date	End Date	FAITAS Course #	Course
			JANUARY 2014
01/06/14	01/17/14	CON 120(FED)	CON 120: Mission Focused Contracting - CANCELLED
01/07/14	01/08/14	FQN BVS	Best Value Source Selection
01/13/14	01/17/14	COR CON	Contracting for CORs (FAC-COR Level II Training)
01/22/14	01/23/14	FQN MRTLC	Market Research and Task Level Competition – New!
01/22/14	01/23/14	FQN HRGC	How to Read a Government Contract – New!
01/27/14	01/27/14	FQN FAR	Annual FAR Update
01/28/14	01/29/14	FQN CPR	Cost and Price Realism – New!
01/28/14	01/29/14	FCN CEEGC	Changes and Equitable Adjustments in Government Contracts
01/28/14	01/29/14	CON CLS	Contract Closeout
			FEBRUARY 2014
02/03/14	02/06/14	FQN CC4	Contract Claims – New!
02/04/14	02/06/14	FCN ADM	Business Analysis and Decision Making in Contracting
02/10/14	02/14/14	COR CON	Contracting for CORs (FAC-COR Level II Training)
02/11/14	02/13/14	FQN ITA	Information Technology Acquisition – New!
02/18/14	02/20/14	FCN ECP	Evaluating a Contractor's Performance - CANCELLED
02/19/14	02/20/14	FCN CEEGC	Changes and Equitable Adjustments in Government Contracts
02/19/14	02/28/14	CON 215(FED)	CON 215: Intermediate Contracting for Mission Support
02/26/14	02/27/14	FQN SDPBPM	Six Disciplines of Performance-Based Project Management™ – New!
			MARCH 2014
03/03/14	03/06/14	FQN CA	Contract Administration
03/04/14	03/06/14	FQN FLC	FAR Less Complicated – New!
03/04/14	03/05/14	FQN ITSC	Management of IT Service Contracts
03/06/14	03/06/14	FCN ARHIFC	Annual Review-Hot Issues in Federal Contracting – New!
03/10/14	03/14/14	COR CON	Contracting for CORs (FAC-COR Level II Training)
03/11/14	03/13/14	FQN CTPSCP	Critical Thinking and Problem Solving for Contracting Professionals
03/11/14	03/13/14	FCN ADM	Business Analysis and Decision Making in Contracting
			CON 217: Cost Analysis & Negotiation Techniques
		BUS FBP	Federal Budget Process
03/24/14	03/28/14	COR CON	Contracting for CORs (FAC-COR Level II Training) - CANCELLED
		FQN CPR	Cost and Price Realism – New! - ADDED
03/25/14	03/27/14	FQN MPBSA	Managing Performance-Based Service Awards
			APRIL 2014
04/02/14	04/02/14	FCN ARHIFC	Annual Review-Hot Issues in Federal Contracting – New!
04/08/14	04/09/14	FCN CDAT	Contract Disputes and Terminations
04/09/14	04/09/14	FQN FAR	Annual FAR Update
			Federal Appropriations Law
04/14/14	04/25/14	CON 218(FED)	CON 218: Advanced Contracting for Mission Support
04/15/14	04/16/14	CON CLS	Contract Closeout
04/21/14	04/25/14	COR CON	Contracting for CORs (FAC-COR Level II Training)
-		FCN ECP	Evaluating a Contractor's Performance
04/29/14	04/30/14	FCN CSB	Contracting with Small Business Concerns

FY 2014 Monthly Schedule

Start Date	End Date	FAITAS Course #	Course
			MAY 2014
05/05/14	05/16/14	CON 360 (FED)	CON 360: Contracting for Decision Makers
05/06/14	05/07/14	FQN CPR	Cost and Price Realism – New!
05/12/14	05/16/14	COR CON	Contracting for CORs (FAC-COR Level II Training) - CANCELLED
05/13/14	05/15/14	FPM PMCON	Project Management for Contracting Professionals
05/28/14	05/29/14	FQN RWW	Requirements Writing Workshop: SOO, PWS, and SOW - New!
			JUNE 2014
06/02/14	06/06/14	COR CON	Contracting for CORs (FAC-COR Level II Training) - CANCELLED
06/03/14	06/04/14	FQN PPA	Prompt Payment Act and Voucher Examination
06/16/14	06/20/14	COR CON	Contracting for CORs (FAC-COR Level II Training) - CANCELLED
			JULY 2014
07/07/14	07/11/14	COR CON	Contracting for CORs (FAC-COR Level II Training) - CANCELLED
07/21/14	07/25/14	COR CON	Contracting for CORs (FAC-COR Level II Training) - CANCELLED
07/23/14	07/24/14	FCN CSB	Contracting with Small Business Concerns
			AUGUST 2014
08/11/14	08/15/14	COR CON	Contracting for CORs (FAC-COR Level II Training)

FY 2014 COURSE DESCRIPTIONS

FQN FAR - Annual FAR Update

This one-day session summarizes recent changes to the Federal Acquisition Regulation (FAR). Course material is continually updated and covers FAR changes finalized in the 12-month period preceding each class. This class enables busy acquisition professionals to "catch up" on a year's worth of changes in a single day.

CLPs: 6.5

Dates: January 27, 2014

April 9, 2014

Vendor: Steven N. Tomanelli and Associates

FCN ARHIFC - Annual Review-Hot Issues in Federal Contracting



Annual Review provides everything you need to stay current in the ever-changing field of government contracts. Use this as a refresher on the developments in contracting over the past year and as an opportunity to network with others. Hear predictions for 2014 and gain a solid understanding of recent events and changes in the contracting world.

Topics include:

- Sequestration how to preserve your market share in uncertain times
- FAR updates what you need to implement now
- Strategic Sourcing the latest OMB guidance
- SCA and DBA compliance crackdowns & violations on the rise
- Cyber Security what your company must do now
- Huge changes coming to GSA and VA Schedule contracting
- A big year for small business issues plus new subcontractor payment protections
- Federal e-commerce and business systems requirements
- Protest Winners, Whiners and Losers avoid their mistakes
- · Pending legislation that will impact federal contracting
- Forecasts for 2013
- · And More!

CLPs: 8

Dates: March 6, 2014

April 2, 2014

Vendor: Centre Consulting Federal Contracting Institute

FQN BVS - Best Value Source Selection

This two-day course provides a thorough walk-through of the source selection and technical evaluation process from acquisition strategy to best-value tradeoffs to debriefings and protests. Through lecture, interactive exercises and case studies, you will learn to:

- Understand best value concept and techniques
- Make the connection between meaningful evaluation factors and efficient source selection
- Describe the phases of, and the regulations governing, source selection
- · Apply the principles of cost-technical tradeoff analysis
- · Demonstrate knowledge of the factors that influence contract award
- Explain documentation requirements and describe proper and thorough techniques

Topics include:

- Rules, Regulations and Policies Governing Competition and Source Selection
- Best Value Planning
- The Source Selection Team and Roles and Responsibilities
- Developing the Source Selection Plan and the RFP
- Technical Evaluation Plans, Evaluation Factors and Scoring Sheets
- Technical Proposal Tradeoffs and Risks/Cost-Technical Tradeoff Analysis
- Evaluation and Decision Process and Documentation of Initial Evaluation Results
- Comparative Analysis
- · Awards without Discussions and the Discussion Process
- Final Proposal Revisions
- Award and Post Award

CLPs: 13

Dates: January 7 – 8, 2014

Vendor: Centre Consulting Federal Contracting Institute

FCN ADM - Business Analysis and Decision Making in Contracting

This course is designed to improve agency acquisitions and contractor performance by enhancing Federal employees' understanding of how sound business analysis and decision making apply sound acquisition and contracting principles.

Topics Include:

- Overview of the Acquisition Process
- Critical Thinking
- Business Analysis and its effect on business relationships
- The basics of a successful business relationship
- Strategic business decisions: strategic sourcing
- Spend Analysis
- Risk Analysis
- Evaluating Contractor Responsibility
- Case studies to reinforce the course units

CLPs: 19.5

Dates: February 4 – 6, 2014

March 11 – 13, 2014

Vendor: Perfena

FCN CEEGC - Changes and Equitable Adjustments in Government Contracts

Professor Ralph C. Nash Jr. wrote the book on government contract changes. **Here is an opportunity to spend two days with Professor Nash** on this core course in Government Contracts and work through the most definitive and comprehensive course book in print on this subject. With full coverage of the Changes Clause, you will learn: what it really means; what triggers it; determining its impact on profit; each party's rights; strategies for effective contract administration; other equitable relief; securing prompt & equitable payment; and calculating the cost of the change.

If you know Government contracts, you know the significance of changes. If you don't know Government contracts, but are becoming involved, you had better know the significance of changes. For there is no doubt that the overwhelming number of operating problems and claims arising out of Government contracts center around questions of actual or constructive changes in the work. No matter how keen your sense of awareness, or how advanced your level of knowledge, Government contract changes is a subject about which you can never know enough. Because it is so active, so volatile, so prone to almost-daily development, that failure to pay it constant court can render your knowledge obsolete. Or, looking at it from the opposite angle, a dedicated effort to "keep current," without periodic reevaluations of the subject as a whole, can lead to the cliché-situation of having forgotten more than you know.

CLPs: 13

Dates: January 28 – 29, 2014

February 19 - 20, 2014

Vendor: Federal Publications Seminars

CON 120 (FED) - CON 120: Mission Focused Contracting

This course is a comprehensive, hands-on study of the entire acquisition process. Using an integrated case study, this class takes you from the initial meeting with a customer to contract completion and closeout. This course builds on the knowledge and skills acquired in CON 110/FCN 110, CON 111/FCN 111, and CON 112/FCN 112 by giving you an opportunity to apply what you've learned. This course is designed for Level 1 students, and emphasizes making informed decisions, problem-solving, and conducting negotiations in support of the customer's mission.

Learning Objectives:

- Give customers sound information and advice
- Cooperatively develop complete purchase request packages
- Lead an acquisition team
- Prepare a synopsis and a solicitation
- Evaluate offers and award contracts
- Evaluate price reasonableness
- Conduct price negotiations
- Monitor contractor performance and apply appropriate remedies
- Modify contracts
- Exercise options
- Complete the contract close-out process

CLPs: 80

Dates: January 6 – 17, 2014 - CANCELLED

Vendor: Management Concepts

CON 215 (FED) - CON 215: Intermediate Contracting for Mission Support

This intermediate-level course is a capstone course presented as a case study in which you demonstrate their ability to develop and execute business strategies to meet customer requirements. During this course, you will work on developing critical thinking skills, analyzing customer needs, developing procurement strategies, and enhancing source selection skills required for successful contract performance. You must complete a pre-classroom assignment prior to attending the course. The vendor will provide this assignment 30 days prior to the start of the class.

Learning Objectives:

- Develop a variety of options and alternative strategies to meet mission needs and promote customer satisfaction
- Apply appropriate laws, regulations, and policies to a complex procurement
- Perform risk analysis and identify mitigation strategies
- Determine appropriate socioeconomic program requirements for the identified acquisition
- Apply formal source selection procedures
- Select appropriate cost and pricing analysis techniques
- Conduct a competitive discussion
- Execute the appropriate contract arrangement to support customer needs

CLPs: 64

Dates: February 19 – 28, 2014

Vendor: Management Concepts

CON 217 (FED) - CON 217: Cost Analysis & Negotiation Techniques

This intermediate-level course is designed for Contract Specialists who have completed Level I contracting training and have at least two years of contracting experience. This course builds on basic pricing skills and introduces methods and techniques necessary to analyze a contractor's cost proposal. The course introduces negotiation strategies, techniques, terminology, and styles. **You must complete pre-classroom reading assignments and a graded quiz before the first day of class**. The vendor will provide this assignment 30 days prior to the start of the class.

Learning Objectives:

- · Determine when cost analysis should be used
- Identify the use and application of a contract audit
- Make a determination on a contractor's estimating and accounting systems
- Calculate a cost objective for direct material, direct labor, other direct costs, indirect costs, facilities capital cost of money, and profit/fee
- Calculate a price/cost objective using simple regression analysis, improvement curve analysis, and statistics
- Outline the process for conducting contract negotiations

CLPs: 40

Dates: March 17 – 21, 2014

Vendor: Management Concepts

CON 218 (FED) - CON 218: Advanced Contracting for Mission Support

This intermediate-level course is the capstone in which you participate in practical exercises involving acquisition planning; cost analysis; negotiation, award, and administration of a sole-source research and development contract; and acquisition planning, source selection, award, and administration of a competitive production contract. You will demonstrate your ability to negotiate fair and reasonable prices and consider the legal implications of various contract situations. The course helps you to develop critical thinking, cost analysis, negotiation, and contract administration skills necessary for successful contract performance.

Learning Objectives:

- Develop a proactive strategic approach to satisfy the customer's evolving requirements
- Take appropriate action to resolve various situations with legal implications
- Use audit reports to prepare a negotiation objective
- Apply contract pricing techniques to develop a pre-negotiation objective
- Develop a negotiation strategy for a noncompetitive negotiation
- Conduct a noncompetitive negotiation
- Manage contract performance in accordance with the contract

CLPs: 80

Dates: April 14 - 25, 2014

Vendor: Management Concepts

CON 360 (FED) - CON 360: Contracting for Decision Makers

This advanced course gives you practice in applying the skills and knowledge gained in previous courses and work experience to realistic learning scenarios. You will work individually and in teams to develop and present innovative approaches and sound business solutions to challenging issues concerning risk, planning, and performance. You will confront an interrelated array of issues that require you to use judgment and comprehensive knowledge to resolve. You will hone problem-solving and critical-thinking skills that will help you develop real solutions to real acquisition problems. The result will be more effective managerial business decisions that support the agency's mission. You must complete a preclassroom assignment prior to attending the course that will form part of your overall grade. The vendor will provide this assignment 30 days prior to the start of the class.

Learning Objectives:

- Hone and improve thinking skills to solve problems and identify various problem-solving methods
- Analyze the complexities of a problem to determine the appropriate problem-solving method to use
- Identify risk management techniques and apply viable solutions to a case, considering both government and contractor perspectives
- Enhance contributions to the professionalism of the organization by being able to identify and analyze the issues of an assigned topic and apply them to the organization
- Identify techniques for effectively managing and implementing change
- Enhance team-building skills as a business advisor and enhance leadership decision making
- Show understanding of the fundamentals of leadership and components of empowerment by applying them to a case
- Recommend a solution to a complex contracting issue
- Apply knowledge of ethical decision making to a current contracting issue
- Identify and analyze current issues in contracting which the organization faces

CLPs: 80

Dates: May 5 – 16, 2014

Vendor: Atlantic Management Center, Inc.

FCN CA - Contract Administration (4-days)

This training course covers the critical duties performed by contracting personnel during the contract administration phase of the acquisition process, including contracts for commercial items and those using simplified acquisition procedures.

Learning Objectives:

- Plan for contract administration
- Conduct a post-award orientation
- Make decisions regarding a contractor's use of subcontracts
- Monitor contractor performance and resolve problems
- Identify and address delays in performance
- · Select and pursue a formal contract remedy and recognize fraud
- Identify and resolve contract disputes
- Describe contract claims procedures
- Terminate contracts for convenience, cause, or default
- Identify the methods to finance commercial and noncommercial item contracts
- Close out contracts

CLPs: 32

Dates: March 3 - 6, 2014

Vendor: Management Concepts

FCN CC4 - Contract Claims



This training course provides both contracting and program personnel with knowledge and skills necessary to recognize the legal and practical implications of government contract claims.

Learning Objectives:

- Explain what constitutes a claim
- Discuss the rules for preparing a claim
- Respond to the filing of a claim

Topics include:

- The Claims Framework
- The Contract Disputes Act of 1978
- Source of Claims
- Equitable Adjustments
- Cost Elements of a Claim
- Preparation of Claims
- Alternative Dispute Resolution
- Proceedings Before a Board of Contract Appeals
- The United States Court of Federal Claims
- Suggestions on Claims Avoidance

CLPs: 32

Dates: February 3 – 6, 2014

Vendor: Management Concepts

CON CLS - Contract Closeout

Designed for the practitioner, this hands-on training course delves into the issues involved with successfully closing out a contract. It begins with a description of what constitutes a contract file and ends with its disposal. In the course, you will discuss organizational structures and players required for closeout, execute the steps required to close out different types of contracts, and handle items of special concern.

Topics include:

- Contract closeout procedures contract completion statement, physical completion, time standards for closing contract files, organizational structure, and personnel involved
- Purpose of contract documentation, types of contract files, and contents of contract files
- Basic closeout principles closeout steps, accelerated closeout, and areas of special concern
- Effects of contract termination on closeout procedures termination for convenience, termination based on inadequate contractor performance, and no-cost settlement
- Time requirements for record retention
- Problem contract closeouts contractor no longer in business, contractor in bankruptcy, contractor unable to submit supporting indirect cost data for submission of final vouchers, contractor fails to submit final invoice or voucher

CLPs: 16

Dates: January 28 - 29, 2014

April 15 – 16, 2014

Vendor: Management Concepts



FCN CDAT - Contract Disputes and Terminations

Contract disputes and terminations are the most problematic aspects of contract administration for both the government and the contractor. At the time of contract award, neither party expects that the contract will be terminated prior to its scheduled completion date or that the parties will be filing one or more claims against each other. When such events do occur, success will go to the party that is better prepared. This course prepares you to deal effectively with the complex issues that arise when a contract is terminated or a claim is submitted. In addition to addressing the many procedural rules that could mean the difference between success and failure, this course merges the discussion of terminations and contract disputes so you can gain a better appreciation of the many ways in which these two processes are interrelated.

Learning Objectives:

- Determine when and how a contract may be terminated for convenience
- Calculate the amount due under a termination settlement proposal
- Apply the rules applicable to terminations for default and identify contractor defenses
- Determine the rights and liabilities of the parties after a termination for default
- Prepare a claim, issue and respond to a contracting officer's final decision and comply with the limitations statutes
- Identify opportunities for ADR

CLPs: 16

Dates: April 8 – 9, 2014

Vendor: ESI International

COR CON - Contracting for CORs (FAC-COR Level II Training)

This course fulfills the requirements for FAC-COR Level II certification and 40 hours toward FAC-COR Level III certification. It covers the Project Officer/COR's responsibilities for guiding acquisitions from initial planning efforts and requirement determination through source selection, contract management, and final payment. It discusses applicable principles, policies, and procedures to achieve the agency's mission through contracting.

Learning Objectives: At the conclusion of this training, you will be able to:

- Identify your responsibilities in the acquisition process from procurement planning through contract management
- Recognize application of statutory law, federal regulation, and the common law of federal contracts to their acquisitions
- Prepare an acquisition plan including an acquisition strategy, an acquisition team with defined
 roles and responsibilities, a practical time line, market research techniques, source selection
 procedure budgeting and funding considerations, outsourcing considerations, logistics, security
 concerns, environmental requirements, and government-furnished information and property
- Prepare key elements of a performance-based work statement, source selection criteria, and technical proposal instructions
- Recognize the requirements for (i) full and open competition, (ii) use of required sources, and (iii) small business set-aside goals and programs
- Observe solicitation constraints including communication with prospective offerors, disclosure of information, and confidentiality
- Understand your input to the source selection process including the technical evaluation plan, evaluating proposals and reaching an agreement, best value analysis, and source selection
- Plan for quality and schedule assurance, select the appropriate remedy for nonconforming or delinquent performance, and prepare contractor performance evaluation reports
- Support timely execution of contract modifications
- Avoid constructive changes
- Review payment requests under fixed price and cost reimbursement contracts and provide timely feedback
- Know and appreciate standards of procurement ethics including areas of proscribed conduct under the Procurement Integrity Act and criminal conflict of interest statutes

CLPs: 40

Dates:

January 13 – 17, 2014 February 10 – 14, 2014 March 10 – 14, 2014 March 24 – 28, 2014 - CANCELLED April 21 – 25, 2014

May 12 – 16, 2014 - **CANCELLED**

June 2 – 6, 2014 - CANCELLED June 16 – 20, 2014 - CANCELLED July 7 – 11, 2014 - CANCELLED July 21 – 25, 2014 - CANCELLED August 11 – 15, 2014

Vendor: Houseman and Associates

FCN CSB - Contracting with Small Business Concerns

This training course defines and describes federal socioeconomic programs. In this course, you will gain a good understanding of program policies, procedures, and problem areas associated with various socioeconomic programs benefiting small businesses. After successful completion of this training course, you will be able to describe the different socioeconomic programs required by the Federal Acquisition Regulation (FAR) and determine which program or programs to use in a particular acquisition

CLPs: 16

Dates: April 29 – 30, 2014 July 23 – 24, 2014

Vendor: Steven N. Tomanelli and Associates

FQN CPR - Cost and Price Realism



This course provides a thorough walk-through of the basics of cost and price realism analysis. The course covers the basic and provides hands-on, interactive learning with exercises, case studies, and group work, to give greater emphasis to the application of the course principles.

Learning Objectives:

- Understand the difference between cost and price analysis
- Identify Government requirements and goals in the contract pricing process
- Explain the legal basis for contract pricing efforts
- Identify the responsibilities of contracting officers and contracting specialists in the contract pricing process
- Learn how to conduct a price realism analysis
- Understand the importance of analyzing staffing in conjunction price
- Learn how to conduct cost realism to avoid protest

Topics include:

- Overview of Price and Cost Analysis
- FAR Requirements
- CO Roles and Responsibilities
- Price Analysis Tools and Techniques
- Understanding Cost Analysis Expand discussion on cost elements; bottom line price;
- Allocable costs Workshop
- Cost Analysis Tools and Techniques
- Cost Realism Analysis
- · What is Cost Realism?
- Justification and Documentation
- Resources

CLPs: 16

Dates: January 28 – 29, 2014

March 25 – 26, 2014 - ADDED

May 6 - 7, 2014

Vendor: Centre Consulting Federal Contracting Institute

- Understanding Special Costs
- Specific Cost Issues-- Workshop
- Labor Rates
- Overhead and G&A
- Profit
- Special Issues
- Uncompensated Overtime
- Low Bids
- "Added Value" Subcontractors
- Negotiation positions Role play workshop
- Preparing for Business Reviews and Audits
- Working with DCAA

FCN CTPSCP - Critical Thinking and Problem Solving for Contracting Professionals

This course addresses the five types of critical thinking needed in acquisition environments: Strategic, tactical, analytical, innovative, and implicative. It also teaches a five-step process for responding to acquisition problems/opportunities: Identify and analyze problems/opportunities, analyze the environment, explore potential responses, select the optimal response, and implement the optimal response. The course includes exercises and case studies, so you can practice using the different thinking approaches to achieve maximum results. You will have the opportunity to apply core concepts to a specific problem or opportunity from their own acquisition environment.

Learning Objectives:

- Explain the importance of critical thinking and problem solving in acquisition competencies matrix
- Identify key decisions to be made in acquisition process
- Leverage current theories on human thought to improve your performance and that of your team members
- Discriminate between the different types of critical thinking styles and determine when to use each type in the acquisition environment
- Uncover acquisition problems and opportunities and learn how to address them
- Assess the internal and external environmental factors surrounding problems and opportunities
- Explore a wide range of potential responses to an acquisition problem or opportunity
- Evaluate potential responses to a problem or opportunity to determine the best response
- Persuade acquisition stakeholders to support the best response, design an action plan for implementing the best response, and successfully execute the action plan

CLPs: 24

Dates: March 11 – 13, 2014

Vendor: ESI International

FCN ECP - Evaluating a Contractor's Performance

All members of the acquisition team will benefit by attending this training course. Coverage includes relationships among the requirements document, risk, contract type, and the need to evaluate contractor performance. In this course, you will learn how to: explain when it is necessary to evaluate a contractor's performance; plan the evaluation; evaluate a contractor's performance; take corrective action; and document the results.

Topics include:

- Planning for Contract Administration
- Initial Steps in Monitoring Contracts
- Work Planning, Scheduling, and Monitoring Techniques
- Earned Value Management System
- Monitoring and Evaluating the Contractor's Performance
- Contract Types and Contract Payment Structure

CLPs: 19.5

Dates: February 18 – 20, 2014 - **CANCELLED**

April 29 – May 1, 2014

Vendor: Management Concepts

- Using Gantt, Milestone, Network, and Swan charts
- Remedies Contractor-Caused Delays
- Withholding progress payments
- Contract Modifications
- Terminations Due to Inadequate Contractor Performance
- Performance Evaluation Reporting

FQN FLC - FAR Less Complicated

The Federal Acquisition Regulation (FAR) and its supplements are the source documents when contracting with both federal defense and civilian agencies. A close and detailed working knowledge of the FAR is mandatory for government, contractor, and subcontractor personnel. This three-day course offers critical information that will help both contracting and technical personnel understand how to negotiate superior contracts and maintain compliance. The instructor will demonstrate how to access, search and update the FAR and provide a plain English, section-by-section overview.

In this course, you will learn how to:

- · Comply with federal contracting regulations
- Use the FAR and its supplements in day-to-day activities
- Select the right clauses and procedures for your contract type
- · Improve bargaining position during negotiations
- · Identify and implement regulatory changes

Topics include:

- Understanding the federal regulation system and history
- Statutory vs. regulatory requirements and guidelines
- Citing the FAR
- Administration and Organization of the FAR: The numbering system; Clauses, Provisions and Forms; Using the Matrix; Updates to the FAR -- Federal Acquisition Circulars (FAC)
- Navigating the FAR on the Web
- Agency supplements
- Tour and analyze individual parts/sections of the FAR, including: Policy, clauses, and forms; Ethics and procurement integrity; Acquisition planning and competition; Contracting methods and procedures; Federal Supply Schedule contracting; Types of contracts; Financial requirements and the Truth in Negotiations Act (TINA); Socioeconomic and small business requirements; Intellectual property and use of government property; Modifications, changes, and equitable adjustments; Terminations; Protests and disputes; Current developments

CLPs: 24

Dates: March 4 – 6, 2014

Vendor: Centre Consulting Federal Contracting Institute

FQN LAW - Federal Appropriations Law

This three-day course covers the fundamental concepts of federal appropriations law. Topics include an overview of the appropriations process, the bona fide needs rule, severable and non-severable contracts, the "Purpose" statute and the Antideficiency Act. Class discussion will be augmented with practical exercises to reinforce these key fiscal concepts.

CLPs: 24

Dates: April 9 – 11, 2014

Vendor: Steven N. Tomanelli and Associates

BUS FBP - Federal Budget Process

This course is designed for government employees new to budgeting responsibilities or those not directly involved in federal budgeting who want an overview of the budget process. In this course, you will learn how to:

- Identify the major legislation affecting the federal budget process
- Track the budget timeline and the three phases of the budget process
- Identify the roles of the major players in the budget process
- Explain how agency budget submissions contribute to the President's Budget
- Outline how agencies use and track their allocated funds
- · List the methods established to audit the use of federal funds
- Quantify the size and scope of the current President's Budget
- Identify trends in federal spending during the last 50 years

Topics include:

- Pertinent budget legislation
- How agencies get their funds
- Budget formulation
- The congressional budget process
- - The Budget of the United States: facts and figures

Budget execution and control

Budget reviews and audits

CLPs: 16

Dates: March 18 - 19, 2014

Vendor: Management Concepts

FQN HRGC - How to Read a Government Contract



Spend two days with Kenneth J. Allen, the author of the book "How to Read a Government Contract," a comprehensive and explanatory book not on how to read, but on the interpretation and requirements of a contract. Participants will receive a copy of the book.

Disputes over the meaning of a contract, and therefore what each party to the contract is required to do, are the most frequently litigated subject in Government contracting as well as in the private sector. This course explains the principles and processes of contract interpretation, which are not set out in statutes or in regulations, but only in the decisions of the judges who have been devising and applying these principles for hundreds of years. Yet, this course, and this topic, is not just for lawyers – who are often the last ones to become involved in an interpretation dispute.

Every professional in the acquisition process needs to be familiar with these principles and concepts, which will be presented in a proactive in approach, i.e., to spot and avoid problems before entering into the contract, as well as fashioning arguments and assessing one's position when in a dispute with the other party. All principles and concepts will be illustrated with real life, uncomplicated, case illustrations.

CLPs: 16

Dates: January 22 – 23, 2014

Vendor: Federal Publications Seminars

FQN ITA - Information Technology Acquisition



This training course focuses on areas and considerations unique to the acquisition of information technology (IT). It is designed for program and contracting personnel who are involved in the acquisition of IT supplies and services. In this course, you will learn how to explain the basis for IT acquisition; conduct mission and business planning, as well as acquisition planning; review established sources and determine which can satisfy the agency need; determine compliance with accessibility requirement; and resolve intellectual property issues.

Topics include:

- Basis for IT Acquisitions
- Planning for IT Acquisitions
- Security, Accessibility, and Other IT Planning Considerations
- Developing Requirements Documents and Evaluation Factors
- Satisfying the IT Need
- Contract Administration

CLPs: 24

Dates: February 11 – 13, 2014

Vendor: Management Concepts

FQN ITSC - Management of IT Service Contracts

This course looks to improving contractor performance by enhancing knowledge and practical application of IT contract management principles, policies and procedures from contract award through contract completion.

Learning Objectives: At the conclusion of this training, you will be able to:

- Recognize applicable regulation, policy, and law that apply to IT contract management
- Serve as a technical liaison between the acquisition team, agency stakeholders, and contractor
- Know the project baseline, key contractual requirements, enterprise life cycle milestones, and security requirements under FISMA, HSPD-12, and the Privacy Act
- Develop a customized COR IT appointment letter
- Review contractor QA/QC plans based upon CMMI certification, project requirements, and performance risk
- Develop a Government quality assurance surveillance plan
- Perform schedule assurance using earned value management principles; integrated baseline reviews; and performance measurement baseline adjustments
- Link performance reviews to payment on a fixed price or reimbursable basis
- Establish service request procedures for service desk, maintenance, and other standby services
- Provide within scope technical interpretation and direction
- Assess needs and costs for work acceleration and stoppage
- Review requests for equitable adjustment and provide recommendations on cost/schedule adjustments
- Complete a contractor performance report based upon IT tailored criteria

CLPs: 16

Dates: March 4 - 5, 2014

Vendor: Houseman and Associates

FQN MPBSA - Managing Performance-Based Service Awards

The purpose of this course is to outline the next steps following the award of a performance-based service acquisition (PBSA). You will learn to measure, document contractor performance, and reach successful contract completion by applying the appropriate incentives. The course case studies and practical, interactive exercises are derived from real-life, performance-based contract management scenarios that take you beyond a mere review of the regulatory and process aspects of obtaining effective contractor performance. You will have an opportunity to observe the key activities following the award of a PBSA and apply that knowledge to your day-to-day contracting environment. You will leave the course with a thorough, updated knowledge of PBSA tools, and be equipped to use these tools to successfully monitor and assess performance, receive and accept services, and close contracts.

Learning Objectives:

- Explain PBSA and the crucial difference between traditional and performance-based approaches to managing contracts
- Use the key tools of PBSA to effectively manage contract performance
- Structure a team that is qualified to manage performance assessment
- Facilitate a partnering relationship between government contract monitors and the contractor
- Employ a recordkeeping and documentation process throughout the performance assessment
- Monitor contracts using key tools of PBSA, such as metrics, surveillance plans, standards, and incentives
- Develop and implement a change management plan
- Avoid or resolve conflict using effective methods for settling disputes and maintaining good working relationships
- Authorize payment properly and close out the contract
- Use innovative ideas and practical tips when managing PBSAs

CLPs: 24

Dates: March 25 – 27, 2014

Vendor: ESI International

FQN MRTLC - Market Research and Task Level Competition



This two-day course explores agency procedures and requirements at the task order level. Attendees will learn strategies to conduct effective market research and document their efforts, and understand how to use the results of that research to enhance their flexibilities. The concepts of best value task orders and socio-economic requirements will also be highlighted.

Topics include:

- Socioeconomic factors and interagency contracting
- Factors at the underlying contract level
- Factors at the task and delivery order level
- Requirements and resources for market research
- Determining and documenting the Best **Procurement Approach**
- **CLPs**: 16

Dates: January 22 - 23, 2014

Vendor: Centre Consulting Federal Contracting Institute

- Best Value task and delivery orders
- **Competition Requirements**
- Adequate competition
- Remedies for Inadequate Competition
- Contractor Protests of task and delivery orders

FPM PMCON - Project Management for Contracting Professionals

As government agencies and companies continue to streamline operations and with the huge growth in public and private-sector outsourcing, contract management is increasingly taking on many elements and responsibilities of project management. When the lines between contract management and project management blur, clear communication and a working knowledge of each discipline's core elements and competencies are vital to the success of a contract or project. Reflecting the latest practices in the project management field and presented from the perspective of contracting professionals, this course offers concise instruction on project management. It covers the entire project life cycle from selection and initiation, through planning, implementation, and control, to termination and closeout. The course also highlights the latest insights from the Project Management Institute's (PMI®'s) A Guide to the Project Management Body of Knowledge (PMBOK® Guide) and incorporates information critical to successful projects.

Learning Objectives:

- Describe the relationship of procurement management to project management
- Discuss the roles and responsibilities of project managers and procurement managers in a project-focused environment
- Understand techniques for project selection
- Develop the foundations of a project plan, including the project requirements document (PRD), work breakdown structure (WBS), responsibility matrix, and supporting plans
- Develop project schedules and budgets
- Manage and control the project against the baseline
- Discuss project leadership issues, including project organization and team dynamics
- Close out a project effectively

CLPs: 24

Dates: May 13 – 15, 2014

Vendor: ESI International

FQN PPA - Prompt Payment Act and Voucher Examination

This course is designed for personnel involved in preparing, examining, and certifying federal contract and vendor payments. In this course, you will learn how to describe the federal payment process; list the general requirements of the Prompt Payment Act and the Final Rule on Prompt Payment; differentiate among items that are subject to the Prompt Payment Act; and describe the legislative history and the benefits of a well-implemented prompt payment process. You will also learn how to certify a voucher for completeness and accuracy; calculate an effective rebate rate; calculate the Effective Annual Interest Rate to determine if taking a discount is the best course of action; calculate interest due on a late payment and the appropriate due date for an invoice given; and calculate interest due on a late payment. In addition, you will discuss the liability of certifying officers and the avenues of relief for liability; when a payment cycle should be stopped and how it can be restarted; and determine proper fiscal year appropriation(s) to use for interest payments.

CLPs: 16

Dates: June 3 – 4, 2014

Vendor: Management Concepts

FQN RWW - Requirements Writing Workshop: SOO, PWS, and SOW



A requirements document conveys the work to be performed under the contract to the contractor. The requirements document can be in the form of a performance-based Statement of Objectives (SOO), a performance-based Performance Work Statement (PWS) or a prescriptive Statement of Work (SOW). While it is often assumed that the program office can define its requirements, too often that is not the case. Contracting professionals need to understand how to draw out those requirements from program personnel and how to use those requirements as the basis for a new competitive solicitation.

Over the past decade, federal acquisitions have been moving more and more towards using either a SOO or PWS where the desired objectives, goals or results are stated, the contractor's performance is measured under a Quality Assurance Surveillance Plan (QASP), and the detailed means and methods of doing the work is left up to the contractor. For Performance-Based Acquisition (PBA) applications, the government is interested in leveraging industry best practices, creativity and tailored solutions. Agency requirements are communicated to contractors using instruments like the SOO and the PWS. However, there are situations where not allowing the contractor the latitude of determining how to do the work and providing the prescriptive details of how the work will be accomplished is necessary.

Key Learning Objectives:

- Differentiate between the types of requirements documents
- Recognize the critical nature of the requirements document
- Define PBA and recognize its importance to development of requirements, to include the QASP
- Develop the different parts of a SOW
- Develop the different parts of the PWS and QASP
- Develop the different parts of a SOO and QASP

CLPs: 16

Dates: May 28 – 29, 2014

Vendor: ASI Government

FQN SDPBPM - Six Disciplines of Performance-Based Project Management™



Contract award is only the beginning. The true success of the overall acquisition process is measured by how well a solution is deployed and how the overall mission of an organization is accomplished. Performance-based management represents a significant departure from how government agencies currently manage contract performance. Traditionally, agencies have focused on process management as the means for overseeing their contractors. The transition from a performance-based contract award to performance-based management requires additional skills and disciplined processes and procedures. This course addresses the many differences between performance-based management and traditional compliance-based contract management.

Key Learning Objectives:

Upon completion of this course, you should be able to:

- Differentiate between managing a traditional contract and a performance-based contract.
- Identify the relationship of the Six Disciplines to the three post-award phases of Plan, Monitor & Measure, and Evaluate & Adjust.
- Utilize the Six Disciplines methodology to manage a project in a performance-based environment.

CLPs: 16

Dates: February 26 - 27, 2014

Vendor: ASI Government